

# Wisconsin Housing and Economic Development Authority (WHEDA)

## Agency Dashboard Performance

Q1 FY18

### Net income

**Metric Definition:** Critical Continue strong earnings to support current and future operations.

Goal Met	Current	Previous*	Target	Trend
In Progress	\$ 8,708,800	\$ 7,336,000	\$ 32,474,000	↑

**Reporting Cycle:** Annual (state fiscal year July 1, 2017 - June 30, 2018)

**Additional Details:** Net income before the market rate adjustment for investments. Target represents WHEDA's net income projection represented in its FY 2017-18 budget approved by the WHEDA Members of the Board.

\*The Previous column contains data for the same year-to-date time period in the prior fiscal year (FY17).

### Credit rating

**Metric Definition:** Maintain a superior Issuer Credit Rating (ICR), which enables WHEDA to access the capital markets and obtain credit at reasonable terms.

Goal Met	Current	Previous	Target	Trend
✓	S&P: AA- Moody's: Aa3	S&P: AA- Moody's: Aa3	S&P: AA- Moody's: Aa3	↔

**Reporting Cycle:** Annual (calendar year)

**Additional Details:** WHEDA's long-term ICR and bond resolution ratings remain unchanged with a stable outlook.

### Mortgage loans funded

**Metric Definition:** Increase Single Family mortgage loans funded.

Goal Met	Current	Previous*	Target	Trend
In Progress	\$ 116,108,000	\$ 102,877,000	\$ 350,000,000	↑

**Reporting Cycle:** Annual (state fiscal year July 1, 2017 - June 30, 2018)

**Additional Details:** Target represents WHEDA's mortgage lending projection represented in its FY2017-18 budget approved by the WHEDA Members of the Board.

\*The Previous column contains data for the same year to date time period in the prior fiscal year (FY17).

### Multifamily loans funded

**Metric Definition:** Maintain multifamily loans funded based on current market conditions.

Goal Met	Current	Previous	Target	Trend
In Progress	\$31,957,100	\$12,032,000	\$168,797,400	↑


**Reporting Cycle:** Annual (state fiscal year July 1, 2017 - June 30, 2018)

**Additional Details:** Target represents WHEDA's multifamily lending projection represented in its FY2017-18 budget approved by the WHEDA Members of the Board.

\*The Previous column contains data for the same year to date time period in the prior fiscal year (FY17).

### Economic development loans funded

**Metric Definition:** Maintain economic development participation loans funded based on current market conditions.

Goal Met	Current	Previous	Target	Trend
In Progress	\$2,566,800	\$0	\$5,000,000	

**Reporting Cycle:** Annual (state fiscal year July 1, 2017 - June 30, 2018)

**Additional Details:** Target represents WHEDA's participation lending projection represented in its FY2017-18 budget approved by the WHEDA Members of the Board.

\*The Previous column contains data for the same year to date time period in the prior fiscal year (FY17).

#### Low-Income housing tax credit allocation

**Metric Definition:** Continued allocation of federal Low-Income Housing Tax Credits (LIHTC) in Wisconsin.

Goal Met	Current	Previous	Target	Trend
N/A	N/A	14.2 million	14.0 million	N/A

**Reporting Cycle:** Annual (state fiscal year July 1, 2017 - June 30, 2018)

**Additional Details:** LIHTC's are allocated annually during the 3rd quarter of FY2018. Amount of allocation based on federal resources.

#### Housing foundation grants

**Metric Definition:** Continue housing grant awards of \$500,000 for special-needs housing providers.

Goal Met	Current	Previous	Target	Trend
N/A	N/A	\$500,000	\$500,000	N/A


**Reporting Cycle:** Annual (state fiscal year July 1, 2017 - June 30, 2018)

**Additional Details:** Housing grant awards are awarded annually. Award competition begins in 3rd quarter with grants allocated during the 4th quarter of FY2018.

## Open and Transparent Government

#### Total number of public records requests received

**Metric Definition** Total number of [public records](#) requests received from 12am CST, July 1, 2017 through 11:59pm September 30, 2017.


Current	Previous	Trend
11	15	

**Reporting Cycle** Quarterly (July 1, 2017 - September 30, 2017)

**Additional Details** [Executive Order #235](#) requires agencies to post public records metrics. Requests may be received verbally or in writing verbally or in writing and are logged by the agency when received.

#### Total number of public records requests completed

**Metric Definition** Total number of [public records](#) requests completed from 12am CST, July 1, 2017 through 11:59pm September 30, 2017.



Current	Previous	Trend
11	15	

**Reporting Cycle** Quarterly (July 1, 2017 - September 30, 2017)

**Additional Details** [Executive Order #235](#) requires agencies to post public records metrics. Completed or closed means no further action is further action is required by the agency. Requests completed during this cycle may have been initiated during a previous quarter.

#### Average time taken to fulfill public records requests



**Metric Definition** Total time taken (in business days) to fulfill [public records](#) requests divided by the total number of public records requests completed in this reporting cycle (from 12am CST, April 1, 2017 through 11:59pm June 30, 2017).

Goal Met	Current	Previous	Target	Trend
	2.09	4.47	10	

<b>Reporting Cycle</b>	Rolling average updated quarterly (July 1, 2017 - September 30, 2017)
<b>Additional Details</b>	<a href="#">Executive Order #235</a> requires agencies to post public records metrics. Completed or closed means no further action is required by the agency. Requests completed during this cycle may have been initiated during a previous quarter. Weekends, legal holidays, time spent waiting due to an open investigation or assessment, time spent waiting for payment of invoices, and time spent waiting for clarification from requestor are not counted in total business days. Requests received and fulfilled within one business day are calculated as zero days. Fulfilled means no further action is required by the agency.

#### Percentage of public records requests acknowledged within one business day



<b>Metric Definition</b>	Percentage of <a href="#">public records</a> requests sent to the agency's primary public requests inbox and acknowledged by the next acknowledged by the next business day (received from 12am CST, July 1, 2017 through 11:59pm September 30, 2017).
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Goal Met	Current	Previous	Target	Trend
	90.90%	86.67%	100%	

<b>Reporting Cycle</b>	Quarterly (July 1, 2017 - September 30, 2017)
<b>Additional Details</b>	This does not include requests sent via channels other than the primary public requests inbox. Acknowledged is defined as a response sent back to requestor by the next business day. Business days do not include weekends or legal holidays.

#### Percentage of current employees completing public records training



<b>Metric Definition</b>	Percentage of current employees that completed public records training by March 1 of each calendar year.
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Goal Met	Current	Previous	Target	Trend
	100%	100%	100%	

<b>Reporting Cycle</b>	Annual (March 1, 2017 - February 28, 2018)
<b>Additional Details</b>	Public records training is available to state employees via our enterprise learning management system. All state system. All state employees (permanent, project and limited term) are required to complete this training. This metric is measured annually on March 1 for employees that started before February 1. Data does not include employees who completed the training, but left employment before the end of the reporting cycle.

#### Percentage of new employees completing public records training



<b>Metric Definition</b>	Percentage of new employees that completed public records training with 30 calendar days of their start date.
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Goal Met	Current	Previous	Target	Trend
	100%	100%	100%	

<b>Reporting Cycle</b>	Rolling average updated quarterly (July 1, 2017 - September 30, 2017)
<b>Additional Details</b>	Public records training is available to state employees via our enterprise learning management system. All new state system. All state employees (permanent, project and limited term) are required to complete this training within 30 calendar days of their start date.

#### Percentage of exiting employees that received notice of public records retention obligations

<b>Metric Definition</b>	Percentage of exiting employees that received notice of public records retention obligations on or before last day of before their last day of employment.
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Goal Met	Current	Previous	Target	Trend
	100%	0%	100%	

<b>Reporting Cycle</b>	Quarterly (July 1, 2017 - September 30, 2017)
<b>Additional Details</b>	It is required that all exiting employees receive notice of public records retention obligations <i>on or before</i> their last day of employment.